## PQS QUALIFICATION SHEET

## Officer Processing Lead (OPL) Module

## (Military and Civilian)

| Name of Trainee | Qualification Start Date | Qualification Due Date |
|---|---|---|
|  |  |  |

| PQS Standard | Trainee (Signature) | PQS Qualifier (Signature) | Date |
|---|---|---|---|
| 1.  Training |  |  |  |
| 2.  Program Knowledge |  |  |  |
| 3.  Applicant Processing |  |  |  |
| 4.  MEPS and Physicals |  |  |  |
| 5.  Enlistments/ Commissioning/ Discharges/Affiliations/ Recalls/Superseding Appointments |  |  |  |
| 6.  Personnel Management |  |  |  |
| 7.  OTools |  |  |  |
| 8.  ASTB/APEX Testing |  |  |  |
| 9.  Office Routine |  |  |  |
| 10.  Record Keeping |  |  |  |
| 11.  Quality Control |  |  |  |
| 12.  Resource Management/ Publications |  |  |  |
| 13.  Final Qualifications |  |  |  |

| | Discuss/ Initial | | | Demonstrate/ Initial | | | Remedial/ Re-qualify | | |
|---|---|---|---|---|---|---|---|---|---|
| | TRAINEE | TRAINER | DATE | TRAINEE | TRAINER | DATE | TRAINEE | TRAINER | DATE |
| **1. Training** | | | | | | | | | |
| a. Explain OPL responsibilities for development, implementation, and documentation of formal, GMT, OJT training and PQS. | | | | | | | | | |
| b. Identify personnel to be trained. | | | | | | | | | |
| c. Identify/explain specific types of training to be given to the following: Officer Recruiter and Officer Processor. | | | | | | | | | |
| d. Describe how to identify levels of training needed. | | | | | | | | | |
| e. In what ways can effectiveness of training be determined? | | | | | | | | | |
| f. List training resources, including personnel within your command. | | | | | | | | | |
| g. Explain different ways of tracking on-going training with an individual. | | | | | | | | | |
| h. Complete Privacy Act training 101 & 103. | | | | | | | | | |
| **2. Program Knowledge – Demonstrate your ability to determine basic eligibility requirements for the following Active and Reserve programs:** | | | | | | | | | |
| a. OCS to include BDCP and aviation programs. | | | | | | | | | |
| b. Nurse Corps to include DA, HSCP, NCP and Recall. | | | | | | | | | |
| c. MSC (to include specialties, HSCP, HPSP, DA and Recall. | | | | | | | | | |
| d. Physician and medical HPSP. | | | | | | | | | |
| e. Dental to include DA, HSCP, HPSP, students and Recall. | | | | | | | | | |
| f. Nuclear Programs | | | | | | | | | |
| g. JAG Corps and JAG Student | | | | | | | | | |
| h. Chaplain Corps, Chaplain Candidates and Chaplain Corps students. | | | | | | | | | |
| i. FAP | | | | | | | | | |

| | Discuss/ Initial | | | Demonstrate/ Initial | | | Remedial/ Re-qualify | | |
|---|---|---|---|---|---|---|---|---|---|
| | TRAINEE | TRAINER | DATE | TRAINEE | TRAINER | DATE | TRAINEE | TRAINER | DATE |
|    j.  NAVET | | | | | | | | | |
|    k.  DCO | | | | | | | | | |
|    l.  MAVNI | | | | | | | | | |
|    m.  Explain both Active and Reserve obligation requirements for above programs. | | | | | | | | | |
|    n.  Explain guidelines to be followed in regards to the Privacy Act. | | | | | | | | | |
|    o.  Explain the Navy's policy towards drug and alcohol abuse for ODS, OCS, Nuclear programs. | | | | | | | | | |
|    p.  Explain the difference between CEC Direct Appointments, CEC BDCP and CEC Collegiate Programs. | | | | | | | | | |
| **3.  Applicant Processing (Active and Reserve programs)** | | | | | | | | | |
|    a.  Explain the courtesy review process from beginning to end. | | | | | | | | | |
|    b.  Demonstrate the knowledge of transportation rules and regulations to make applicant travel arrangements and prepare travel orders for NUCVIPs, MEDVIPs, OCS, NUC and Chaplain interviews. | | | | | | | | | |
|    c.  Explain kit "ownership". | | | | | | | | | |
|    d.  Explain steps required for scheduling an applicant for processing. | | | | | | | | | |
|    e.  Briefly explain each of the forms required for the following applications for Application to Board, MEDWAIVE and FINDOCS: | | | | | | | | | |
|       (1) Basic OCS, to include aviation programs. | | | | | | | | | |
|       (2) General medical programs | | | | | | | | | |
|       (3) Physician (including credentialing section) | | | | | | | | | |
|       (4) Nuclear Programs | | | | | | | | | |

| | Discuss/ Initial | | | Demonstrate/ Initial | | | Remedial/ Re-qualify | | |
|---|---|---|---|---|---|---|---|---|---|
| | T R A I N E E | T R A I N E R | D A T E | T R A I N E E | T R A I N E R | D A T E | T R A I N E E | T R A I N E R | D A T E |
| (5) DCO | | | | | | | | | |
| (6) NAVET | | | | | | | | | |
| (7) BDCP/HSCP Programs | | | | | | | | | |
| (8) Recalls | | | | | | | | | |
| (9) JAG Programs | | | | | | | | | |
| (10) Chaplain Programs | | | | | | | | | |
| (11) MAVNI Programs | | | | | | | | | |
| f. At what points in the process do you review the applicant's file with the applicant/without the applicant? | | | | | | | | | |
| g. At what point in the process should the processor take responsibility/ownership of the officer application? | | | | | | | | | |
| h. Explain final quality control checks, routing of completed applications and tracking procedures after submission at the following: NAVCRUITDIST and NAVCRUITCOM. | | | | | | | | | |
| i. Explain the reconsideration process to include requirements and timeframes, less than six months and greater than six months. | | | | | | | | | |
| j. What types of documents are not to be reproduced photographically and what are the correct procedures for proper documentation? | | | | | | | | | |
| k. Describe application maintenance, including residual file record keeping for inactive duty, collegiate, HPSPs, NCPs and DAs and steps taken for destruction of files and timeframes for each. | | | | | | | | | |
| l. Explain the steps required for requesting and preparing travel orders to include OCS, ODS, NUC interviews, NUCVIP and Chaplain interviews etc. (COMNAVCRUITCOMINST 1130.8, 1131.2, JFTR, NROTC Professor's Guide). | | | | | | | | | |

| | Discuss/ Initial | | | Demonstrate/ Initial | | | Remedial/ Re-qualify | | |
|---|---|---|---|---|---|---|---|---|---|
| | T R A I N E E | T R A I N E R | D A T E | T R A I N E E | T R A I N E R | D A T E | T R A I N E E | T R A I N E R | D A T E |
| m. Explain the proper procedures for JPAS. | | | | | | | | | |
| n. Demonstrate the ability to identify active vice reserve designators, to include specific program names. | | | | | | | | | |
| o. Explain the MEDWAIVE process from beginning to end. | | | | | | | | | |
| **4. MEPS Physicals (USMEPCOM REGS, MEPS Memorandum, NAVMED P-117), Contract Physicals and MTF Physicals** | | | | | | | | | |
| a. Explain your liaison duties in regard to scheduling and then requesting completed applicant physicals, consults, inspections and communication physicals. | | | | | | | | | |
| b. List quality control checks performed on pre-screen forms prior to requesting a MEPS physical. | | | | | | | | | |
| c. Explain the procedures used in scheduling applicants for processing at MEPS (to include transportation, required forms and documentation). | | | | | | | | | |
| d. Demonstrate the ability to maintain liaison with MEPS and other service processing personnel. | | | | | | | | | |
| e. Describe quality control checks performed on a completed physical. | | | | | | | | | |
| f. Describe applicant flow at MEPS. | | | | | | | | | |
| **5. Enlistments/Commissioning/ Discharges/Affiliation/Recalls/ Superseding Appointments (COMNAVCRUITCOMINST 1131.2)** | | | | | | | | | |
| a. Explain the screening process required as well as what forms must be completed prior to Enlistment/ Commissioning/Affiliation/Recall/MAVNI and Superseding Appointments. | | | | | | | | | |
| b. List and explain forms to be completed prior to and then during the Enlistment/Commissioning/Affiliations/ MAVNI and Recall. | | | | | | | | | |
| c. Explain special procedures required for selectees currently enlisted in the Naval Reserve prior to and after Officer Candidate enlistment. | | | | | | | | | |

| | Discuss/ Initial | | | Demonstrate/ Initial | | | Remedial/ Re-qualify | | |
|---|---|---|---|---|---|---|---|---|---|
| | T R A I N E E | T R A I N E R | D A T E | T R A I N E E | T R A I N E R | D A T E | T R A I N E E | T R A I N E R | D A T E |
| d. List the steps required for distribution of forms and for establishing service, health, pay records and entering PFA scores in PRIMS. | | | | | | | | | |
| e. Explain liaison procedures with PSD, NAVCRUITCOM, schools commands and reserve activities. | | | | | | | | | |
| f. Explain steps required for discharging both active and inactive enlistees. | | | | | | | | | |
| g. Explain both active and inactive DEP management, including liaison responsibilities. | | | | | | | | | |
| h. Explain the requirement for a reserve affiliation after commissioning has occurred. | | | | | | | | | |
| i. Demonstrate the ability to establish Enlisted and Officer Service Records and Medical Records. | | | | | | | | | |
| j. Demonstrate the ability to accurately complete a DD Form 4 for active and inactive duty enlistment. | | | | | | | | | |
| k. Demonstrate the ability to accurately locate and complete specific program service agreements for both active and reserve programs, to include: | | | | | | | | | |
| (1) BDCP/HSCP Programs | | | | | | | | | |
| (2) CEC Collegiate, CEC DA and CEC BDCP Programs | | | | | | | | | |
| (3) Medical programs with HPLRP | | | | | | | | | |
| (4) OCS Programs | | | | | | | | | |
| (5) DCO Programs | | | | | | | | | |
| l. Explain the importance of the DD 368 prior to an enlistment or commissioning. | | | | | | | | | |
| 6. Personnel Management | | | | | | | | | |
| a. Explain how the OPL leads assigned personnel concerning: | | | | | | | | | |

| | Discuss/ Initial | | | Demonstrate/ Initial | | | Remedial/ Re-qualify | | |
|---|---|---|---|---|---|---|---|---|---|
| | T R A I N E E | T R A I N E R | D A T E | T R A I N E E | T R A I N E R | D A T E | T R A I N E E | T R A I N E R | D A T E |
| (1) Daily delegation of duties | | | | | | | | | |
| (2) Priority setting | | | | | | | | | |
| (3) Screening of processing flow | | | | | | | | | |
| (4) Reassignments within the OPO department | | | | | | | | | |
| b.  Explain your working relationship with: | | | | | | | | | |
| (1) Officer Programs Officer | | | | | | | | | |
| (2) Officer Recruiters | | | | | | | | | |
| (3) Enlisted Recruiters | | | | | | | | | |
| (4) Officer Processors at NAVCRUITDIST/NORS/Navy Reserve Centers | | | | | | | | | |
| (5) NAVCRUITDIST/ Region/ NAVCRUITCOM Chains of Command | | | | | | | | | |
| (6) BUMED | | | | | | | | | |
| (7) NAVMED MPT&E | | | | | | | | | |
| (8) Other services (including Navy Reserve) | | | | | | | | | |
| (9) MEPS personnel | | | | | | | | | |
| (10) NAMI | | | | | | | | | |
| (11) PSD | | | | | | | | | |
| (12) NAVCRUITCOM Processors | | | | | | | | | |
| **7.  OTools is fundamental to recruiting success.  The OPL is a key person in the execution of OTools and the designated OTools trainer for the department.  The OPL should be able to demonstrate proficiency in the following OTools tasks:** | | | | | | | | | |
| a.  Demonstrate the ability to make proper entries and complete required fields on a record in OTools. | | | | | | | | | |
| | | | | | | | | | |

Enclosure (18)

| | Discuss/ Initial | | | Demonstrate/ Initial | | | Remedial/ Re-qualify | | |
|---|---|---|---|---|---|---|---|---|---|
| | T R A I N E E | T R A I N E R | D A T E | T R A I N E E | T R A I N E R | D A T E | T R A I N E E | T R A I N E R | D A T E |
|    b. Demonstrate the ability to attach documents into OTools, to include naming files correctly. | | | | | | | | | |
|    c. Demonstrate the ability to accurately enter PPI on applicants/ recruiters. | | | | | | | | | |
|    d. Demonstrate the ability to identify the appropriate sections in OTools which show current status of the kit once submitted to NAVCRUITCOM. | | | | | | | | | |
|    e. Demonstrate the ability to correctly create and complete a "next action" in OTools. | | | | | | | | | |
|    f. Demonstrate the ability to perform a query to obtain needed information in OTools. | | | | | | | | | |
|    g. Demonstrate the ability to identify and enter Subspecialty codes in OTools. | | | | | | | | | |
|    h. Explain the procedures required for submitting a "Footprints" ticket in OTools. | | | | | | | | | |
|    i. Demonstrate the ability to accurately scan, upload and correct name files in OTools. | | | | | | | | | |
|    j. Demonstrate the ability to train new users in all aspects of OTools use. | | | | | | | | | |
| **8. ASTB/APEX Testing (COMNAVCRUIT COMINST 1131.2 and NAMI P-5098 A)** | | | | | | | | | |
|    a. List required authorization/ custody, sub-custody letters | | | | | | | | | |
|    b. Explain testing procedures to include: | | | | | | | | | |
|        (1) Eligibility screening | | | | | | | | | |
|        (2) Monitoring of testing | | | | | | | | | |
|        (3) Debriefing the applicant | | | | | | | | | |
|        (4) Stowage/security of test materials | | | | | | | | | |
|        (5) Transmittal of and requests for testing | | | | | | | | | |
|        (6) Procurement/requirements for testing of the demos | | | | | | | | | |

| | Discuss/ Initial | | | Demonstrate/ Initial | | | Remedial/ Re-qualify | | |
|---|---|---|---|---|---|---|---|---|---|
| | TRAINEE | TRAINER | DATE | TRAINEE | TRAINER | DATE | TRAINEE | TRAINER | DATE |
| (7) Required documentation | | | | | | | | | |
| c. Explain procedures required for reporting loss or compromise of testing materials. | | | | | | | | | |
| d. Demonstrate the ability to operate/explain the use of APEX. | | | | | | | | | |
| e. Inventory, administer, proctor, score and forward the Aviation Selection Test Battery (ASTB). | | | | | | | | | |
| **9. Office Routine (COMNAVCRUITCOMINST 1131.2, 1131.4, COMNAVCRUITCOMNOTE 5214, SECNAVINST 5216.5 and NAMI P-5098A) - Explain the process for the following:** | | | | | | | | | |
| a. Walk-in | | | | | | | | | |
| b. Phone call | | | | | | | | | |
| c. Initial blueprinting for the Officer Recruiter's information | | | | | | | | | |
| d. Explain kit ownership, when turnover should occur, preparation of, screening, updating, revision and tracking through completion of the kit. | | | | | | | | | |
| e. Explain preparation, screening, revision, tracking, routing and forwarding procedures for incoming, outgoing, and departmental correspondence to include: | | | | | | | | | |
| (1) LEADS (mail-out and NALTS) | | | | | | | | | |
| (2) Memoranda | | | | | | | | | |
| (3) Required monthly, quarterly and yearly reports | | | | | | | | | |
| (5) Instructions/directives | | | | | | | | | |
| (6) Processing and IG irregularities | | | | | | | | | |
| f. Identify security requirements for the following: | | | | | | | | | |
| (1) Testing material | | | | | | | | | |
| (2) Applicant information | | | | | | | | | |

| | Discuss/ Initial | | | Demonstrate/ Initial | | | Remedial/ Re-qualify | | |
|---|---|---|---|---|---|---|---|---|---|
| | TRAINEE | TRAINER | DATE | TRAINEE | TRAINER | DATE | TRAINEE | TRAINER | DATE |
| (3) Accountable inventory | | | | | | | | | |
| (4) PPI | | | | | | | | | |
| **10. Record Keeping** | | | | | | | | | |
| a. List logs, files and directives the OPL is responsible for maintaining. | | | | | | | | | |
| b. Explain the following: | | | | | | | | | |
| (1) Goals | | | | | | | | | |
| (2) Yearly Recruiter Goaling Letter | | | | | | | | | |
| **11. Quality Control (COMNAVCRUITCOMINST 1130.8 and 1131.2)** | | | | | | | | | |
| a. Identify the mandatory pre-application kit quality control checkpoints for Application to Board, MEDWAIVE and FINDOCS. | | | | | | | | | |
| b. Demonstrate the ability to verify for completeness and accuracy all officer programs forms and documents (Active and Reserve). | | | | | | | | | |
| c. Demonstrate the ability to effectively use the checklists to ensure completeness of an officer application. | | | | | | | | | |
| d. Demonstrate the ability to review physical examination results using the following documents: | | | | | | | | | |
| (1) Report of Medical Examination | | | | | | | | | |
| (2) Report of Medical History | | | | | | | | | |
| (3) Medical Supportive Documents | | | | | | | | | |
| (4) Consults | | | | | | | | | |
| e. Explain how to identify and resolve discrepancies between the application forms (active and reserve). | | | | | | | | | |
| f. Demonstrate how to use the APSR to explain inconsistencies in an application. | | | | | | | | | |

| | Discuss/ Initial | | | Demonstrate/ Initial | | | Remedial/ Re-qualify | | |
|---|---|---|---|---|---|---|---|---|---|
| | TRAINEE | TRAINER | DATE | TRAINEE | TRAINER | DATE | TRAINEE | TRAINER | DATE |
| **12.  Resource Management/Publications – give a synopsis of the following:** | | | | | | | | | |
| a.  COMNAVCRUITCOMINST 1131.2 Chapter 8 – Collegiate Management | | | | | | | | | |
| b.  COMNAVCRUITCOMINST 1130.8 – CRUITMAN-ENL | | | | | | | | | |
| c.  COMNAVCRUITCOMINST 1131.2 – CRUITMAN-OFF | | | | | | | | | |
| d.  PQS-OFF | | | | | | | | | |
| e.  HARP, OHARP and Seminar | | | | | | | | | |
| f.  COMNAVCRUITCOMINST 1500.4 – Training Program | | | | | | | | | |
| g.  COMNAVCRUITCOMINST 1650.1 and 3100.1 – Gold Wreath Award | | | | | | | | | |
| h.  COMNAVCRUITCOMINST 1650.1 and 3100.1 – Individual and Unit Annual Incentive Awards | | | | | | | | | |
| i.  COMNAVCRUITCOMINST 5400.2 – SOPMAN | | | | | | | | | |
| j.  COMNAVCRUITCOMINST 1131.2 – Officer Program Accession Goals | | | | | | | | | |
| k.  COMNAVCRUITCOMNOTE 5214 – Reporting Requirement for NAVCRUITCOM Activities | | | | | | | | | |
| l.  BUPERSINST 7040.6 – Financial Management Guide for PCS Travel (Military Personnel Navy) | | | | | | | | | |
| m.  NAVCOMPTINST 7300.99 – Navy Standard Documents Number System and Related Accounting Classification Reference Numbers and Implementation | | | | | | | | | |
| n.  Joint Federal Travel Regulations | | | | | | | | | |
| o.  SECNAVINST 5216.5 Navy Correspondence Manual | | | | | | | | | |
| p.  NAMI P5098B – ASTB | | | | | | | | | |
| q.  NAVMED P-117 – MEDMAN | | | | | | | | | |
| r.  OTools Field User's Guide | | | | | | | | | |
| **13.  Final Qualifications** | | | | | | | | | |

|  | Discuss/ Initial | | | Demonstrate/ Initial | | | Remedial/ Re-qualify | | |
|---|---|---|---|---|---|---|---|---|---|
|  | T R A I N E E | T R A I N E R | D A T E | T R A I N E E | T R A I N E R | D A T E | T R A I N E E | T R A I N E R | D A T E |
| a.  Must be OP PQS qualified |  |  |  |  |  |  |  |  |  |
| b.  Recommended for OPL PQS Board |  |  |  |  |  |  |  |  |  |
| c.  Successfully completed OPL PQS Board (may be waived by CO, NAVCRUITDIST until assignment to billet is imminent) |  |  |  |  |  |  |  |  |  |

**14.  Record of Qualification:**

a.  Recommended for PQS Qualification Board.        Date: _____

I, _____, certify that _____
   (Name/Rate/Qualifier Position)                          (Name/Rate)
is ready for final qualification by a PQS Board for the position of OPL.

Qualifier's Signature _____

b.  Qualification Board                    Date: _____

We certify the examinee to be fully qualified for the position of OPL.

_____        _____
Board President (Name, Rank, Position)              (Signature)

_____        _____
Board Member    (Name, Rank, Position)              (Signature)

_____        _____
Board Member    (Name, Rank, Position)              (Signature)

_____        _____
Board Member    (Name, Rank, Position)              (Signature)

c.  Reviewed:                              Date: _____

PQS Training Officer, NAVCRUITDIST _____ _____
                                                        (Signature)

d.  Approved:                              Date: _____

Commanding Officer, NAVCRUITDIST _____ _____
                                                        (Signature)

    e.  Service Record Entry (Page 4):           Date: _____

Chief Administrator, NAVCRUITDIST _____ _____
                                                (Signature)

You are hereby granted an extension.  Your new maximum qualification date is
_____.  (Attach a copy of extension request with justification).


                            _____
                            Commanding Officer NAVCRUITDIST


Copy to:
Member's Training Record